BOARD OF COUNTY COMMISSIONERS

AGENDA ITEM SUMMARY

Meeting Date: <u>18 Aug</u>	ust 2004	Division:	Growth Management	
Bulk Item: Yes No	o <u>X</u>	Department:	Marine Resources	
AGENDA ITEM WOR Discussion of staff effor and marine facilities plan	ts to develop a Re		oliciting consulting services	to prepare a public water access
facilities. Public access cost of marine facilities working waterfronts to commercial fishing indu would land their catch. and for the continuation inventory and assessme which many feel should Management Division develop a Request for approval of the FY 04-0	s it has become ap to marinas has been (shoreline propert continue in existen- ustry in the Keys, for Staff has met with of working water int of existing man do be maintained, will work with the Proposals. Staff staff budget. Growth	come an issue as marine faciliti ies) has escalated with other proceed in Monroe County. Commondation of the more and more difficult in a number of parties who have fronts in the traditional sense, rine facilities, an assessment of but for which property values the community, the Marine and anticipates putting the RFP of	es have been purchased and roperty values in the County ercial fishing interests, thoug to own, operate, and maintage expressed concern about in The development of a marific future needs, and options a have made continuation and Port Advisory Committee out for public response during eximately \$75,000 in the correction.	t the County's remaining marine redeveloped for private use. The making in nearly prohibitive for the continuing in a vital and viable in marine facilities at which they issues of continued public access ine facilities plan will include an for protecting some of the uses almost prohibitive. The Growth e, and other interested parties to ng the fall of 2004 pending the ming year's budget (FY 04-05) to swill be present for this item.
PREVIOUS RELEVA	NT BOCC ACTI	ON:		
CONTRACT/AGREENA	MENT CHANGE	ES:		
STAFF RECOMMEN Discussion item	DATIONS;			
TOTAL COST:	Unknown		BUDGETED: Ye	es X No
COST TO COUNTY:	Unknown	SOURCE	OF FUNDS:	··
REVENUE PRODUCI	NG: Yes	No <u>X</u> AMOUNT	Per MonthY	/ear
APPROVED BY:	County Atty	NA OMB Purchasing	NA Risk Manageme	Durge Barrett
DIVISION DIRECTO	R APPROVAL:	Timothy McGarry,	Director of Growth Manage	thent Carries
DOCUMENTATION:	Included X	To Follow	Not Required/	
DISPOSITION:			AGENDA ITEM N	10: 12

Government funding shortages, growing demand for waterfront and barriers to new development are putting boating's future at risk.

Condo construction has become a cominion a sight at Marina del Rey, which is actually a recreational boat harbor composed of dozens; of smaller marinas. With residential as well as office buildings towering over marina slips, boatowners, who sometimes feel like mere scenery, have expressed concerns about the blocking of sunlight and the channeling of wind between the buildings, which can make it more difficult to still and earts elles.

Pulofic Vicites Access

No water access, no boating.

It's a simple equation, yet a fundamental fact for the marine industry. Unfortunately, it frequently gets lost in the shuffle-of seemingly and that's something the industry. larger, more measurable issues - and that's something the industry cannot afford.

A simultaneous drop in government funding, increased development of waterfront property and a growing number of roadblocks to the creation of new access facilities have made maintaining current levels of water access difficult. And they've made increasing access lev-

levels of water access difficult. And they've made *increasing* access levels nearly impossible.

"The pressure on water access has increased nationwide in a variety of ways," says Jim Frye, executive director of the Marina Operators Association of America and the States Organization for Boating Access. "These pressures will continue to increase, Competition for use of lands providing access to water will increase, and so access for recreational boating will suffer."

This issue is especially timely for the boating industry as it prepares for a season many believe will offer significant growth.

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meultimate hassle

Industry leaders often speak about the importance of retaining first-time boaters by selling the boating dream and climinating the hassle of spending time on the water. A lack of boating access, however, is the ultimate hassle. And it's one that has been known to prevent boat sales and to cause current boat owners to give up the sport. If the industry is to take full advantage of what appears to be an economic recovery, it must put boating access in the front seat.

"[Water access] should be right up there with other strategically important issues including, one, recruiting future boaters; two, providing safe, dependable and environmentally sensitive boating products and facilities; and, three, documenting the value of recreational boating," says Ed Mahoney, co-director of the Recreational Marine Research Center (RMRC).

This is especially true because of the cyclical nature of water access problems.

"Reduced boat sales and boating involvement ultimately means less funding to secure and enhance access," he says, "which, in turn, will further reduce boating satisfaction, involvement and boat sales."

Moving access to the forefront

Today's headlines are riddled with lawsuits, mergers and acquisitions, disagreements among boat builders and dealers, and industry-wide marketing campaigns. It's easy to understand, then, how something as localized as a water-access issue can be overlooked.

One day, a public ramp on a lake in Michigan closes. A few hundred boaters are displaced. The next day, a marina in Southern California sells out to a condo developer, and a few hundred boaters are evicted and forced to find new berths.

Those who are affected are typically forced to work harder to go boating. It may mean driving further, waiting in line, or finding a new body of water to spend time on. Or it may mean giving up boating. A few boaters lost here, a few lost there, and suddenly it begins to add up. But no one is doing the math.

There is no industry body, no government agency tracking the level of water access for boaters. No one knows how many public ramps or marinas there are today in the U.S. Worse yet, the industry doesn't know if those numbers are shrinking or skyrocketing on a national basis. This only underscores the lack of importance the industry has put on the issue.

Despite the inability to quantify the problem, however, there are a number of concerns across the country. For example, Mahoney, who is also a professor at Michigan State University, says that there has been a decline in water access in the Great Lakes. Florida, California and Rhode Island are also facing inadequate access.

With a sincere focus on growing the sport and establishing a plan for growth, the industry may soon find itself face-to-face with these access issues. And if it fails to accommodate new boaters on any significant scale, the industry will perpetuate one of its most costly mistakes – selling the dream to first-time boaters only to scare them away by delivering a nightmare.

"Too often the boating industry has been slow or too divided to assertively deal with issues

Silver Bay Marina, a success story for Minnesota's DNR, was built in the late 90s before state funding outbacks began.



that will impact the future of recreational boating and the sviability of boating businesses," says Malioney. "Seldom do different sectors of the industry come together with agencies and locating organizations to demand and support national boating strategies."

Government funds drying up

Up until a few years ago, Minnesota could have been considered a boating access success story. The state's Department of Natural Resources has helped grow the number of public boat ramps from about 400 or 500 in 1979 to over 2,000 today.

The DNR's Larry Killien says his department was building about 30 new ramps per year. Lately, however, a variety of factors have made it harder to achieve this kind of growth.

Primary among those is the issue of funding. Killien, who is also the president of SOBA, estimates that funding for water access has declined about 30 percent in Minnesota over the past five years. As a result, he says the state's DNR has had to cut its staff and the number of projects it can complete over the past few years.

And this isn't just an issue in Minnesota.

"I would say that Michigan, Wisconsin, California, Florida and Oregon had been doing a really good job [of growing water access] up until a few years ago," he says. "We are having the same problem as almost any state beautilities fone that is well-funded."

California, in fact, seems to have it even worse than Minnesota. Its Department of Boating and Waterways is expecting a 50percent cut in its construction budget - from \$70 million in 2001 to \$35 million in 2005. according to Herald Flood, planning unit supervisor for the department.

This is especially disturbing when considering the results of the California Boating Facilities Needs Assessment completed at the end of 2002. It indicates that the state will have to spend over \$800 million over the next 15 years on boahing infrastructure to keep up with the anticipated growth in the number of boaters. That would require a minimum investment of about \$53.3 million per year.

If there's one thing that California has going for it, however, it may be ahead of the game in understanding its access needs.

There are a relatively few states that regularly develop recreational boating plans that include assessment of the adequacy of recreational boating access," sayss Mahoney. "Few if any have a good handle on the

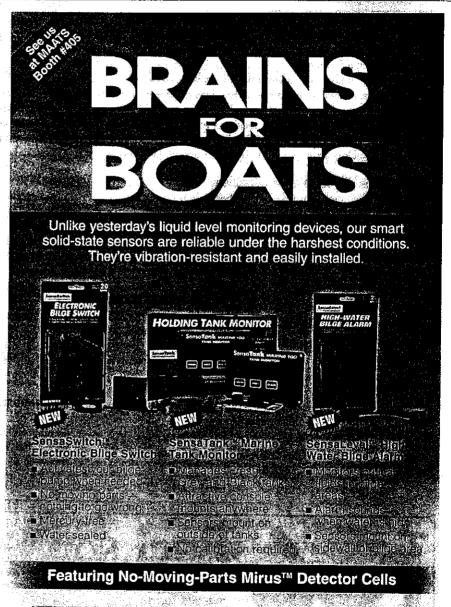
demand for boating access or the capacity of existing access"

In many cases, the decline in funds for boating access, like that in California, doesn't just impact new development. It also impacts the upkeep and restoration of older boat ramps and marinas.

"Facilities are falling into disrepair and

not being renewed for a lack of capital or commitment," says Frye. "Many of the boat ramps built by the states need to be renewed, and again, that lack of available resources is hindering this renovation and replacement."

This underfunding isn't just at a government level either. Chronic undercapitalization of the marina industry has made it diffi-



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I think it's probably showing up first and hardest in Florida, but I believe it's an issue that's going to have to be addressed nation-wide.

Joe Lewis
Marine Industries Association of Florida

cult for potential marina investors to fund new facilities.

"Even if funding for new boating facilities is acquired," Frye explains, "unfounded environmental concerns have, in some localities, created an atmosphere that dictates potential marina investors spend sometimes hundreds of thousands of dollars on a variety of federal, state and local environmental permits and studies to prove that their facility will not have a negative environmental impact, even before the first shovel of dirt is moved."

Hurdles rise for new development

New development in California is becoming much more difficult. California boat dealer J.R. Means III calls the issue of water access in Southern California "extremely volatile," expressing particular concern with the lack of industry unification to fight the decline in access he has observed.

Not only is there a shortage of slips in his region, the price of those slips that are available are discouraging many boaters.

"If you want to develop a marina in a place where there isn't a marina already, it won't happem," he suggests.

This isn't a problem just in California either. Marina occupancies are very high all around the country, says Frye, in many cases well above 90 percent or more. And boats often don't get sold without a place to berth them.

Meanwhile, thresholds for permit requirements are increasing all the time, according to Frye. In addition, because the easiest and most appropriate places to develop marinas and boat ramps have been exhausted, developers are faced with adapting to "challenging areas."

These areas tend to be more remote, which often drives up infrastructure costs, he adds. Killien seconds that.

"Now, when we go to [build a ramp], finding a good site and one you can afford and getting the community to agree, it's a lot more work than it used to be," he explains.

Thirty years ago, if the state couldn't afford a prime piece of waterfront, it would buy a piece of wetland for next to nothing and fill it in.

"We didn't know any better. That's the way things were done," he says.

Now, while the regulations have made life better, development costs more. Waterfront property prices also are increasing dramatically and the budgets for boating agencies are not keeping pace. In addition, as the value of waterfront property increases, many struggling marinas see selling to a developer as an easy way out.

"It is increasingly more difficult for small marinas to survive," says Mahoney. "In many ways the small marinas situation is similar to the small farm problem. Small marina owners view their marinas at their retirement income and when they sell very often the marina is converted to other uses."

This is especially a problem in Florida, where the industry is "losing marinas right and left to condo developers," says Joe Lewis, executive director of the Marine Industries Association of Florida (MIAF).

"I think it's probably showing up first and hardest in Florida, but I believe it's an issue that's going to have to be addressed nation-wide," he says.

The industry is currently seeking solutions for this problem, however, "we don't want to tell privately held marinas what they can and can't do with their properties," Lewis explains.

Other options include developing incentives to keep marinas, such as tax relief, grant money or reduced submerged land fees, or asking the government to buy marinas' development rights.

"The reason they're [selling out to developers] is there is a tremendous financial gain to be had there," Lewis states.

The numbers game

NMMA has lobbyists in 17 states who battle on behalf of industry manufacturers on issues including water access, and MOAA says it has dedicated staff to promote and protect boating access on the state and local level.

"We're doing battle on the federal, state and local levels hassle CONTINUED ON Page 33





hassle CONTINUED FROM Page 30

every day," says Frye. "We employ lobbyists around the country to monitor and react to legislation and regulations that threaten access."

These efforts are not sufficient, however. With water access battles being fought on local, state and federal levels simultaneously, individual companies need to take a stand in their community and in their state.

"Political involvement by the members themselves is one of the keys to preventing a decline in water access," says Frye.

The industry also needs to work more closely with boaters and state boating agencies to help preserve and grow access.

"It certainly would be nice for all of us to be pulling in the same direction," says Killien. "Most state agencies are political animals. If we don't have the support of the public and the industry, we might be overlooked or underfunded."

But, even if the industry and boaters united to lobby the government to develop policies to preserve and grow water access, there would be a lack of data to back it up.

SOBA has been working to create a national database of boat ramps and marinas for several years. Recently, RBFF has partnered with SOBA and NMMA in an effort to try to maintain and grow the database. Through the agreement, RBFF has been funding the effort, which it has contracted out to MOAA.

"Hopefully, that info will be available through the Water Works Wonders Web site," says Bruce Matthews, RBFF president.

SOBA believes the industry needs a nation-wide boating needs assessment that would rate those areas in need of greater water access based on a priority scale.

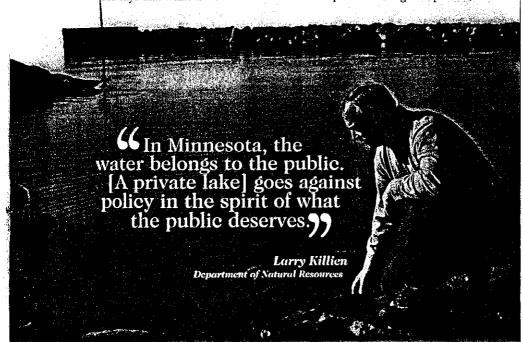
"It's been on SOBA's agenda for a few years," Killien explains. "We just don't have the checkbook for it."

SOBA's annual budget is about \$90,000. One consultant SOBA executives spoke with estimated that the project would cost over half a million dollars. However, Killien believes the initial study could be done for a lot less than that.

Another form of data the industry is lacking is the economic impact of boating on a federal, state and local level.

"Some states like Michigan, Florida, Maryland, and New York," Mahoney says, "regularly conduct state-wide economic impact studies. But the problem is that it is difficult to apply the aggregate numbers (e.g., recreational boating in Michigan is a \$2.25 billion industry) to local situations (e.g., the economic impact of expanding an existing marina)."

He says that while the state-wide economic impact of boating is important, it's





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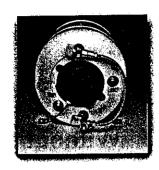
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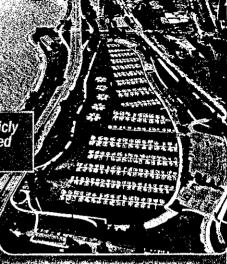


Public/private n the rise/

While funding shortages continue, publicly owned marinas and boat ramps operated by private firms will likely increase.

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difficult to be faced with reduced boating access or interested in an investment to increase access to disaggregate the numbers and apply them to their situation. And special economic impact studies are often expensive and take time to complete.

"What is needed," says Mahoney, "and RMRC is currently developing them, are spending profiles for different boater seg-

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ments that can be used with estimates of the impacts of changes in access to estimate the positive and negative economic impacts of increased or decreased access on local communities."

Through his work with RMRC, he is in the process of developing such spending profiles in addition to an online economic impact tool that can be used to estimate increase or decrease in boating economic impacts.

"If we go to Congress and say, "We need billions of dollars worth of access, and by the way, did you realize 14 million dollars of income to this region comes from boating. That is how you take this information and make it salable," says Killien. "Everyone is squeezed right now, and sometimes we don't have the info to back up what we're asking for."

Even though Mahoney is an economist, he says the industry also has to recognize and market the quality of life benefits to boating.

"For example, recreational boating and boating facilities can enhance a community's aesthetic appeal and quality of life," he explains. "The same facilities if incorporated as part of retail and dining complexes can attract different markets. They can also add to the value of real estate property near these facilities."

These things, in addition to boater spending and economic impacts, should be taken into account, even though they are more difficult to estimate.

Assembling this information now is especially important, given the other challenges the industry is facing.

"Of course [a decline in water access] can have negative impacts on future boat sales," Mahoney says, "especially when reduced access occurs at the same time we are recruiting fewer boaters and there is more competition from other forms of recreation."

Efforts underway

While the industry hasn't been making water access its top priority, it certainly hasn't been ignoring it. MOAA, for example, has done quite a bit in the name of preserving and growing water access.

For one, it launched National Marina Day in 2001 and is



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Circle Fast Action No. 118



Steps to preserving & CROWING water access:

- Developing an access monitoring system that analytically tracks boating access including public and private mannas and launching ramps. This should not only include quantity but also the quality (e.g., ability to accommodate and service new boats) of boating access. Currently, we do not have good information on the capacity of mannas or launch ramps relative to demand.
- ma Encouraging communities to incorporate access into their local community and recreation planning. This is often not the case even for communities that are highly dependent on recreational boating.
- Identifying and mapping boating access sites and facilities. We should then make that information available to boaters in a convenient fashion.

- Exposing and actively resisting unscientific efforts to restrict public access and deny marina permits. This includes unsubstantiated formulas for determining carrying capacity of recreational boating waters.
- Examine recognition that commercial marinas and launch facilities are an important form of access. It does not have to be publicly held and operated to be counted as boating access.
- Proactively reviewing proposed policies and regulations that limit access. We must challenge policies and regulations that are not valid or needed.
- Increasing recognition of the importance of recreational boating and convincing congressional representatives that recreational boating harbors should be a higher priority when it comes to Army Corp of Engineers dredging.

Source: Ed Mahoney co-director RMRC working to grow the grassroots event. NMD's goal is the education of politicians, civic leaders and the public about the important role the marina industry plays in cities and towns across the nation as family-friendly gateways to boating and stewards of the environment. MOAA says it all helps raise awareness about the benefits of water access.

"While the number of National Marina Day participants has grown by over 50 percent from the first year of its observance to its second, and all indications point to continued growth this year, total industry participation in National Marina Day is still comparatively small," admits Frye. "With greater industry involvement, this important industry initiative will grow at an even faster rate and have a larger impact on educating politicians, civic leaders, and the general public about our industry. This educative process will, in turn, strengthen the marina industry and ultimately help to promote water access."

Another effort MOAA has undertaken is support of a piece of legislation before the California Assembly that would lengthen the period of concession contracts for marina operators in California state parks to 30 years.

"MOAA feels, rightly, that it is in the best interests of local, state and federal governments, as well as the boating public, that leases entered into by government and marina operators should be long enough to allow marina operators

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to recover the capital they invest in the facility to ensure that it serves as a safe, environmentally friendly gateway to boating," explains Frye.

He expects that similar legislation will be introduced in other states in the future in an effort to make the construction and improvement of marina facilities easier and more affordable.

A third project launched by MOAA in 2001 is an educational conference for federal, state and local lake managers. Sixty federal lake managers from the U.S. Army Corp of Engineers, U.S. Forest Service, U.S. Bureau of Reclamation, the National Park Service, and other federal agencies attended the conference, entitled Marina Management 101, in 2003.

"You can tell people all about the many challenges marinas face as they try to provide the public with access to America's waterways, but until you see a marina in action, that knowledge is all academic," Frye says.

It's important, however, that responsibility for preserving water access isn't relegated strictly to the marina segment of the industry. For one, the marina segment of the industry doesn't have the funding to tackle it by itself. More importantly, as a fundamental requirement for boating, water access must be on the agenda of all groups that purport to promote the industry.

While manufactures and retailers are making efforts to jointly create a program designed to grow boating," Frye suggests, "those two groups should consider working more closely with the marina

industry's efforts to grow public awareness about the economic value of marinas to cities and towns across the country."

MIASF has also confronted the decline in water access. It created a Marine Master Plan several years ago, which among other things sets out a framework through which the industry can work with local government to preserve access.

The state boating departments are getting creative. In Minnesota, for example, Killien says they've been considering launching an "adopt a ramp" program, similar to the adopt-ahighway programs.

An organization participating in the program could "mow the lawn, pick up litter or fund dock improvements and repair," all things the state is now doing less frequently due to funding shortages, he suggests.

Given the NMMA's position in the industry as the largest and most well-funded association, it would be easy to dump responsibility for an issue of this magnitude on its shoulders. However, this truly is an example of an issue that can benefit from full participation by individual marine companies in their community, by all industry associations, by boaters and by boating associations.

"NMMA can and should take a leadership role, but in partnership with other industry associations, federal and state boating agencies and boater organizations," says Mahoney. "This is too significant an issue for only one organization to be involved."

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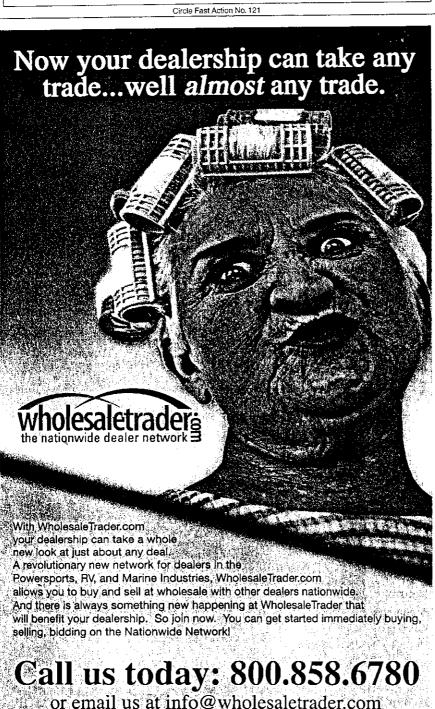
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Circle Fast Action No. 122



Theultimate hassle

Get a grip on the state of water acces and plan for ways to stop the decline maintain and grow access.

One of the major reasons water access often slips through the fingers of the industry, boaters and governments is a lack of planning for recreational boating at a local, state and federal level.

Most states - even those most popular with boaters - don't have a strategic plan that identifies the amount and types of recreational boating access that is needed to provide quality experiences in the future, declares Ed Mahoney, co-director of the RMRC. And they should.

Mahoney says each state's plan should

- a spatial analysis of boating access and regular monitoring of changes in access;
 access objectives (e.g., locations, type) and alternative strategies for achieving these objectives; and
- non-traditional approaches to providing public access including preferential taxation of private/commercial property that provides access, purchase of access easements, public-private cost-sharing of access infrastructure, purchase of development rights, and reaffirmation of public water access rights

Local communities, especially shore line communities with a great deal of boating activity, should include recreational boating as part of their community planning with an eye to maintaining, updating and increasing boating access, says Mahoney Unfortunately, it is rare to find specific mention of recreational boating in community plans even ones that are dependent on boating, he says. Communities should consider zoning and acquisition as a means of preserving and securing access

The Marine Industries Association of South Florida established a Marine Master Plan two and a half years ago, which is one of the few examples of a community plan for recreational boating. It includes 120 people on seven different committees, "focused on doing all we can to protect this valuable resource for the marine industry, which is a huge economic engine," says Frank Herhold, MIASF executive director.

White Herhold says establishing the plan took "a real commitment," including a financial investment, he expects it to pay off in the long run. And he believes that other boating communities should consider adopting similar plans. "It's Important that the marine industry get

involved in their community's waterfront planning process to ensure that they aren't zoned out of existence," he says. — LIZ WALZ

Another group that has become involved in fighting for access - and may have to ramp up its involvement - are boaters themselves. One way the industry could work with boaters on access issues would be for boat builders and dealers to inform their customers about the need for public access, says Killien. He suggests they could incorporate messages about water access into their advertising, stating, "Without public access, you can't get to the water. Please support your DNR public access program."

"Somehow we need to get the message to the general user of the product," he says. "I don't think a lot of the users realize how this program works. They don't realize they fund a lot of the program [through] gas taxes and such."

Making significant progress on an issue the size of water access will likely require the joint participation of groups like BoatU.S. and Standing Watch with the industry and local, state and federal government groups.

Another reason for unity

Mahoney believes that water access, like many issues that could negatively impact recreational boating, "requires new alliances and a 'coming together' of different sectors of the industry, boating organizations and boaters in support of long-term fixes and pro-active strategies to reverse the loss of access"

"There are many efforts and successes including boaters and industry associations fighting for additional access sites, sportsman's clubs co-funding the development of boat launch facilities, and commercial marinas joining together to fund dredging of public waterways," Mahoney says. "While there are success stories, often they are a response to a local or immediate access issue. Solving the particular problem can actually camouflage the longterm situation."

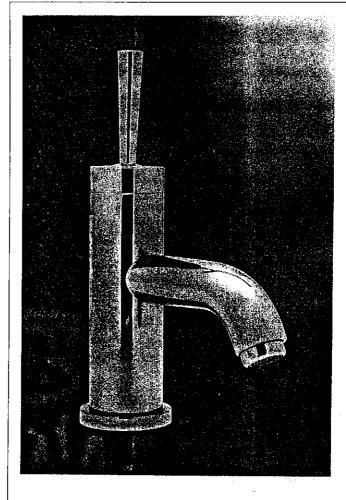
He explains that most states do not have integrated and strategic boating access plans, and if they do, funding is insufficient to deal with the immediate, never mind the long-term, loss of access.

"Solving immediate or local access problems often does not force the type of policies and mediation that will be necessary," he says.

With indicators suggesting a healthy U.S. economy this year, state funding of water access may gradually return to pre-1999 levels. This won't remedy the problem by itself, though it's a step in the right direction. Factors such as demand for

waterfront property and increased obstacles to new development are likely to only increase.

"The continuing erosion of recreational boating access is insidious," Mahoney concludes, "and when combined with other factors could have a long-term negative impact on recreational boating."



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